

**SACWIS Partnership Forum
Meeting Minutes
August 30, 2005**

SACWIS Partnership Forum Meeting		
Participants		Members Absent
Terry Adams	Shahnaz Khan	James Beard
Crystal Allen	Ron Kirkendall	David Boyer
Cathy Appel	Laurie Kuhnke	MaryAnn Drewry
Brenda Alexander	Mike Latham	Helen Jones-Kelley
Kathy Bartlett	Kelly Lynch	James McCafferty
Eric Bush	Stephen Mayo	John Saros
Katherine Canada	Julie Mogavero	Dean Sparks
Gary Crow	Linda Peters	Robert Suver
Robby Dallamora	Rhonda Reagh	Denise Wipert
Nancy DeRoberts-Moore	Thomas Roelant	
Mike Gustin	Angelo Serra	
Sarah Hay	Rick Smith	
Jann Heffner	Jeannie Weisbrod	
Thomas Heilman	Jim Williams	
Connie Humble	Loretta Wilson	
Julie Kenniston		

MINUTES

Opening Remarks/Introductions

Kim Liston, MIS Deputy Director, opened the meeting. Ms. Liston shared comparisons of the SACWIS system to large initiatives such as Medicaid Management Information Systems (MMIS) and Ohio Administrative Knowledge System (OAKS). Partnership Forum members provided roundtable introductions. Housekeeping items for the day's meeting was conducted by Nancy DeRoberts-Moore, SACWIS Project Manager. The members reviewed and approved the June 28, 2005, meeting minutes.

Project Status

Angelo Serra, SACWIS Technical Project Manager, provided the current schedule and status for the upcoming phases in SACWIS:

- System Test, October 2005;
- User Acceptance Testing (UAT), January 2006;
- SACWIS Pilot, April 2006 and;
- SACWIS rollout, July 2006

Requirements are complete. Design is 96 percent complete; development is 65 percent complete. There are currently 181 reports, forms, and notices in SACWIS (140 standard and 41 statistical). Major milestones include Comprehensive Assessment Planning Model Interim Solution (CAPMIS) and identified interfaces. 1,132 requirements and 167 Use Cases have been developed. Mr. Serra noted approximately 27 management reports are planned as part of the first SACWIS release.

Overview of CAPMIS Policy Training

Leslie McGee, Protective Services Section Chief, provided an overview of CAPMIS policy training. Ms. McGee noted CAPMIS will be rolled out prior to SACWIS. There will be three stages to CAPMIS

training. The first stage includes a one-day Orientation Training session for managers and supervisors scheduled to begin November 2005 at the Regional Training Centers.

The second stage is statewide CAPMIS Implementation Training. The training will mirror the schedule used for SACWIS training to enable counties to receive CAPMIS training in advance of SACWIS training. Stage three will support SACWIS training from May to December 2006.

Cathy Appel, Clark County Deputy Director, noted critical data could be lost during the gap in time when CAPMIS is used in paper form and SACWIS is rolled out. Ms. Appel stated Risk Assessments were at risk of being lost if captured on paper before the county implemented SACWIS.

Members discussed the CAPMIS Pilot Risk Assessments and utilization of Microsoft Word. Kathy Bartlett, SACWIS Requirements Manager, noted there is currently no way to directly map the Risk Assessment in SIS to the new CAPMIS model in SACWIS. Mike Latham, Dynamics Research Corporation (DRC) Project Manager, explained Risk Assessments captured in Word can be copied and pasted into SACWIS. He noted issues for county consideration might be the amount of time involved as well as the cost of moving the data from Word to SACWIS. Ron Kirkendall, Hamilton County Assistant Director, stated that counties need to plan for moving the Word templates to SACWIS to avoid having data located in multiple places. Family Assessment Planning Model (FAPM) pilot counties will have two or three years of data that will need to be moved from Word documents to SACWIS. There may be some way to automate this process. Angelo Serra advised he will review the issue as a system requirement. Counties have requested not to be trained simultaneously on CAPMIS and SACWIS.

Ms. McGee advised the new ODJFS screening policy will be part of CAPMIS training. Deputy Director Appel noted that a county's screening policy will determine which screening tools are used. Wayne County Director Tom Roelant noted only a small percentage of caseworkers perform screening. Director Roelant suggested an advanced CAPMIS training class for those caseworkers.

Leslie McGee noted that training participants will be eligible to receive Continuing Education Units (CEUs) for CAPMIS policy training which will last two to four days, depending on worker roles. A Forum member expressed concern the Regional Training Centers (RTCs) could not accommodate CAPMIS training. Ms. McGee stated she is currently working with the Regional Training Centers (RTCs) this issue.

Implementation Schedule Considerations

Steve Mayo, DRC Implementation Lead, provided an overview of the SACWIS Implementation Schedule considerations. Mr. Mayo noted the SACWIS Integrated Project Team (IPT) is in the process of defining the statewide roll-out schedule. SACWIS Implementation will be conducted in waves, one wave every two weeks. There will be 6-10 counties per wave or a metropolitan county, with a total of 16 waves. The first three to four waves will include SIS counties. Considerations for assigning counties to waves include: training, county preferences, data conversion, planning, and on-site support.

SACWIS classroom training is planned to occur within 30 days of each county's "go-live" implementation date. Training will be provided at the Automated Systems Training Center nearest to each county. Additional sites will be secured in counties where necessary.

A draft statewide implementation schedule will be completed by the end of September. Counties will have an opportunity to review the schedule and provide feedback. Following county feedback, the implementation schedule will be finalized.

Tom Heilman, SACWIS Implementation Manager, advised "train-the-trainer" training is part of the training approach. The schedule for "train-the-trainer" training is in process.

Change Management Training Overview

Nancy DeRoberts-Moore provided an overview of Change Management Training. Change Management Training is designed to assist county and state staff to prepare for SACWIS implementation. Ms. DeRoberts-Moore provided an outline of Change Management Training outcomes and identified the benefits that counties will receive by identifying Change Agents and supporting their participation in SACWIS Change Management Training.

The Change Management Training field test was held August 8, 2005. The pilot session for Change Management Training is scheduled to be conducted September 19, 2005. The training sessions are scheduled to run September 29 through November 21, 2005, and will be provided at regionally dispersed locations across Ohio. When determining attendance at Change Management Training, counties should consider the ratio of one Change Agent for every twelve employees. Session registration materials will be e-mailed to counties shortly.

Director Roelant inquired if counties should send their most technologically savvy users to attend Change Management Training. Ms. DeRoberts-Moore noted the decision depends on how roles and responsibilities are aligned in each agency, however a mix of management and line staff would be ideal. Change Agents should be early accepters of SACWIS.

Director Roelant requested clarification regarding the Champion, Change Agent, and Super User roles. Ms. DeRoberts-Moore noted a Champion is typically a manager who provides leadership and has the authority to make decisions. In some counties, the Super User and Change Agent could be the same person. In other counties, the Change Agent may have responsibility for agency public relations or communications. Agency Super Users may come from a variety of roles.

A SACWIS system demonstration is scheduled to be provided at the Public Children Services Association of Ohio (PCSAO) Conference in September 2005.

User Acceptance Testing (UAT)

User Acceptance Testing (UAT) is scheduled to begin December 2005 or January 2006 and run for 90 days. UAT is business flow driven and will cover the spectrum of Child Welfare practice. Test cases will be scenario driven, will cover functionality across the application, and will be based on real data and experience. The scenarios developed to date cover all of the modules in SACWIS.

County and State Subject Matter Experts (SMEs) may be asked to validate the testing scenarios. A group setting in a controlled environment will be utilized for UAT. Testing will occur at the Columbus Air Center. In the near future, the SACWIS IPT will be seeking state and county SMEs willing to participate in UAT. UAT participants will be required to attend UAT training and be available for at least one full 30-day cycle of testing during the ninety day testing period.

Mr. Latham stated the testing plan is very aggressive and approximately 600 Web pages will be tested within the SACWIS system over the course of 90 days. Due to the testing plan's aggressive schedule, remote testing will not be possible.

Katherine Canada, Franklin County Director of Planning, Information Systems and Evaluation, inquired regarding the characteristics of the testers. Assistant Director Kirkendall suggested detail-oriented troubleshooters would make good testers. Sam Sutton, SACWIS Testing Lead, explained the scenarios must be placed into documented test scripts; therefore the SMEs validating the scenarios should have a strong working knowledge of the child welfare process. Mr. Latham suggested designated Super Users would make good testers. Director Roelant noted the difficulty for some counties to commit resources for 30 days in a row.

Mr. DeRoberts-Moore stated testers will first attend the two-day SACWIS User Training, and follow with a half-day of UAT training. Mr. Sutton stated the plan is to populate the UAT test environment with pilot county data. In addition, testers will be needed for 30-day cycles. Mr. Latham noted Use Cases developed during SACWIS requirements and design will be used as a framework on which to build the UAT scenarios. First, the system will be tested to prove the system does what it should, and then test for variants.

Organizational Assessments Update

Tom Heilman, SACWIS Implementation Manager, provided an update regarding Organizational Assessments (OAs). OAs are 40 percent complete and, all OAs should be complete by the end of November. OAs have been completed for all of the Partnership Forum counties; and, good progress is being made overall. An additional OA team has been added to allow two teams to run concurrently. Refinement of the OA presentations and the OA process is ongoing.

Assistant Director Kirkendall inquired if common themes have been raised during the OA's. Mr. Heilman stated CAPMIS is a common issue. Conversion, data cleanup, work process changes, and training on the SACWIS reporting tools are frequently raised issues. Assistant Director Kirkendall further inquired which issues are of most concern to the SACWIS IPT. Ms. DeRoberts-Moore noted isolated counties are expressing some resistant to SACWIS. Another reoccurring inquiry relates to the need for county training regarding the reporting capabilities in SACWIS. Mr. Mayo noted the SACWIS IPT is encouraged as assessed counties have provided sufficient resources to participate in the OAs and have committed to providing the necessary resources to plan and implement SACWIS.

Independent Verification & Validation

Mr. Serra provided an overview of Independent Verification and Validation (IV&V). Bearing Point, Inc. was selected to provide IV&V services, an objective assessment of the project product and processes. Bearing Point, Inc. has been charged to verify and validate the system, and focus on business and technology. Key team members will be interviewed, one assessment of each deliverable will be performed, and actual development practices will be validated and verified. Risk management strategy and capacity analysis verification will also be performed. Bearing Point, Inc. will also complete code inspections and walkthroughs. Counties are welcome to send technical staff to participate during these inspections and walkthroughs.

County Reimbursement Policy Update

Ms. DeRoberts-Moore shared an early draft of the SACWIS County Reimbursement Policy. Mr. Serra and Ms. DeRoberts-Moore continue to work with Deputy Director Smith and Dennis Blazey, OCF Fiscal Analyst, regarding the fiscal policy. Deputy Director Smith stated the ODJFS Office of Fiscal Services (OFS) will utilize the early draft to develop a fiscal policy for county reimbursement.

Action Items

- Kathy Bartlett to meet with Cathy Appel and Jann Heffner to discuss case services issues and Roe vs. Staples impact.
- Further updates will be provided regarding Mobile Technology.
- SACWIS Project Team will continue to address worker productivity and cost benefits analysis relative to the use of SACWIS.
- SACWIS Project Team to provide an update regarding SACWIS Interface Requirements for SETS, CRIS-E, and MMIS.
- Additional discussion requested regarding IV-E courts and access to SACWIS.
- Members of the SACWIS IPT to meet with several Pro IV counties to discuss conversion of Pro IV data.
- Kathy Bartlett will provide an overview description of the CAPMIS system to counties.

Next Partnership Forum Meeting

October 21, 2005

10:00 AM-3:00 PM

Air Center, 4200 E. 5th Avenue

Columbus, Ohio 43219

Recommended Agenda Items:

- Mobile Access
- Yield rates statewide and by county regarding IV-E issue
- Conversion
- SACWIS Rollout Schedule
- Questions Forum members send to the SACWIS mailbox

Meeting Adjourned